Ernest Orlando Lawrence Berkeley National Laboratory

Information Technology Division

BLI: eRoom Advanced

Curtis McDonald

Information Technology Division

Agenda

- **Overview of eRoom**
- **Managing data**
  - **Exercise #1** **access rights, version control, inbox**

(Break)

- **Data base**
  - **Exercise #2** **canned database**
  - **Exercise #3** **freeform database**

(Break)

- **Project Plan**
  - **Exercise #4** **project creation**
- **Questions**

Information Technology Division

2

Overview of eRoom

- Primary functions
  - Document management
    - Access control
    - Version control
    - Email into system
  - Project management
    - Gantt charts
    - Status reports
  - Data bases
    - Configured
    - Free form

Overview of eRoom

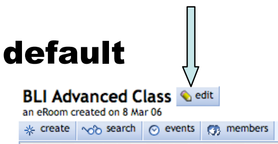
BERKELEY LAB

- Features
  - Web based client accessible anywhere in the world
  - Ability to have internal and external members
  - Search
    - In an eRoom or system wide
    - Inside documents
  - Email notifications
  - Email inboxes
    - Allowed from non-members

Overview of eRoom

BERKELEY LAB

- eRoom settings
  - For coordinators only by default



- Options available
  - Status
  - Name
  - Options
  - Invitation
  - Welcome message
  - Usage reports

Managing Data

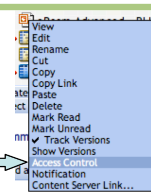
BERKELEY LAB

- Access rights
- Version control
- Adding people to an eRoom
- Searching
- Email inboxes

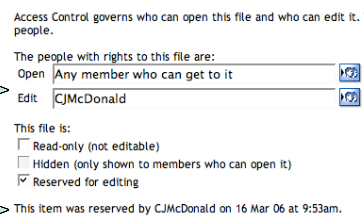
(Exercise #1) access rights, version control, inbox

Access Rights

- **Right click any data type icon to display options**
  - **Select access control**

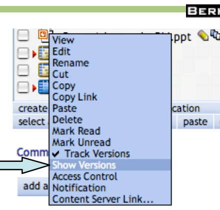


- **Select persons who need to be able to read and/or edit the item.**
- **If a file is checked out, it will be listed here**

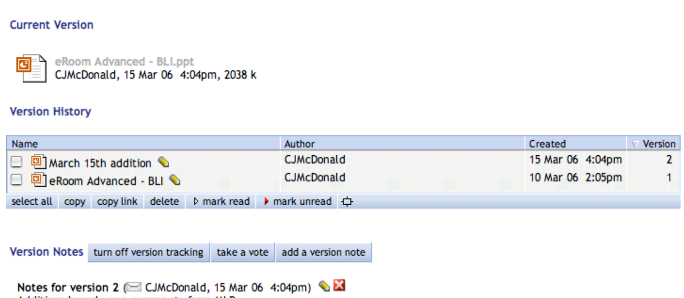


INFORMATION TECHNOLOGY DIVISION

Version Control



- **Right click document icon and select show versions or click show versions icon**



INFORMATION TECHNOLOGY DIVISION

Version Control

BERKELEY LAB

- **Editing versus viewing**
  - **Clicking a document will open it in view mode**
    - ~ **If changes are made to the document, eRoom will prompt you to save the changes (with plugin only)**
  - **Editing a document will reserve (lock) the file**
    - ~ **Reservation is removed when changes are saved back to eRoom**
    - ~ **If anyone else tries to edit they are notified the file is being edited**

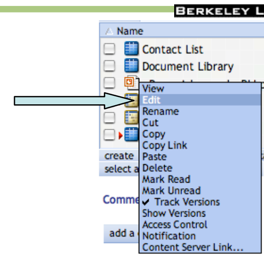
INFORMATION TECHNOLOGY DIVISION

9

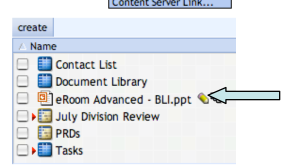
Version Control

BERKELEY LAB

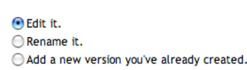
- **To edit a file and reserve it**
  - **Right click icon for file and select edit**



  - **Select pencil icon to right of file name (detailed viewing mode)**



  - **Prompted to edit, rename or add a new version already created**

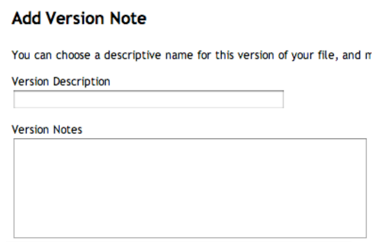


INFORMATION TECHNOLOGY DIVISION

10

Version Control

- **After editing is completed**
  - **File is automatically saved back to eRoom (with plugin)**
  - **Must choose to upload new version (without plugin)**
  - **Both prompt for additional version details**



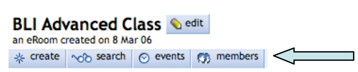
INFORMATION TECHNOLOGY DIVISION

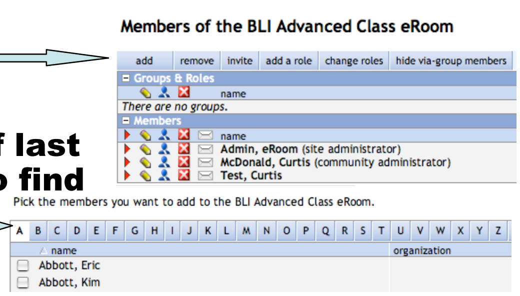
11

Adding people to an eRoom

Internal people in LDAP

- **Click the members button from the root of your eRoom**
  - **Only available to coordinators**
- **Click add**
- **Click first letter of last name and scroll to find the person**
  - **Or…**





INFORMATION TECHNOLOGY DIVISION

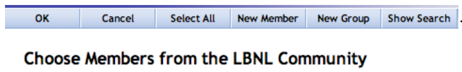
12

Adding people to an eRoom

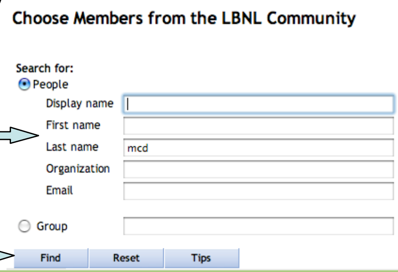
BERKELEY LAB

Internal people in LDAP (continued)

- **Click show search button**



- **Enter beginning of first or last name and click find to display**

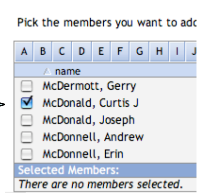


Adding people to an eRoom

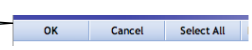
BERKELEY LAB

Internal people in LDAP (continued)

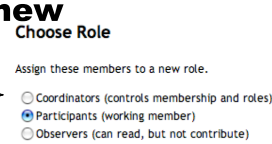
- **Click check box next to their name**



- **Continue searching and selecting members until complete**
- **Click ok**



- **Select the role to apply to the new members**
  - **Coordinator**
  - **Participant**
  - **Observers**



Adding people to an eRoom

External people

- **Try searching for their name**
  - **They may already have an account**
- **To request a new external account send the following information to eroom@lbl.gov**
  - **Person's name (first and last)**
  - **Person's email address**
  - **Company/organization they work for**
  - **Account number to be used for monthly recharges**

INFORMATION TECHNOLOGY DIVISION

15

Searching

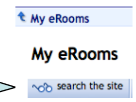
- **eRoom can search for data in all data types**
  - **Word, excel, powerpoint, autocad, etc**
  - **Database, project plan, email inbox, etc**
- **eRoom indexes (searches for new information) every 5 minutes**
- **Two types of searches**
  - **Within an eRoom**
  - **Within all eRooms you have access to**

INFORMATION TECHNOLOGY DIVISION

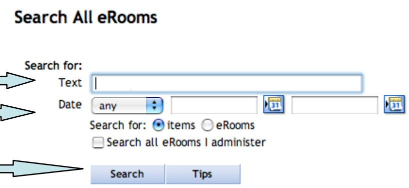
16

Searching

- **Within all eRooms which I have access to**
- **From main eRoom page 'My eRooms' select search the site button**



- **Search for any text**
- **Select date range**
- **Click search**

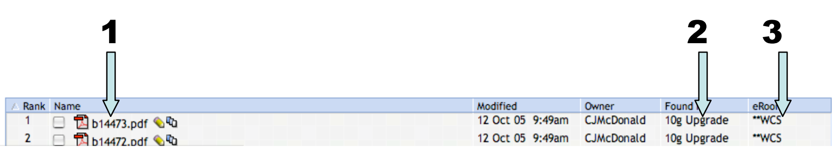


INFORMATION TECHNOLOGY DIVISION

17

Searching

1. **Click document name to open document**
2. **Click folder name to open folder containing document**
3. **Click eRoom name to open eRoom**

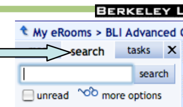


INFORMATION TECHNOLOGY DIVISION

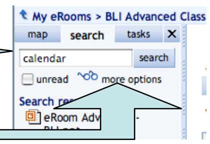
18

Searching

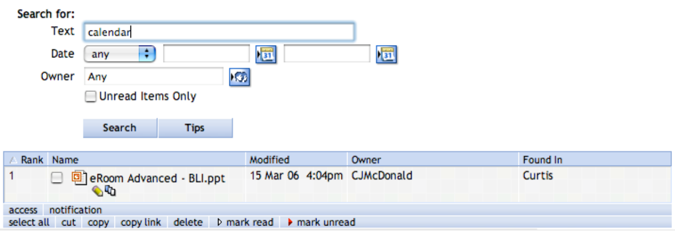
- **In an eRoom click the search tab**



- **Search for any text**



- **Click more options to display details and additional options**

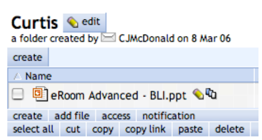


INFORMATION TECHNOLOGY DIVISION

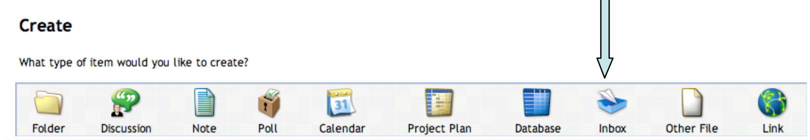
19

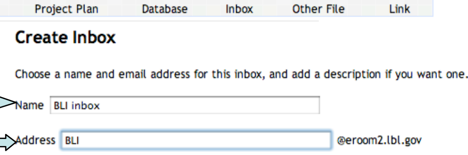
Email Inboxes

- **Choose create**



- **Select inbox**





  - **Select a name**
  - **Select the address**

INFORMATION TECHNOLOGY DIVISION

20

Exercise #1

Login to eRoom and open the BLI Advanced Class eRoom

1. Access rights
   1. Create a folder called 'your name' in the root of the BLI Advanced eRoom
   2. Create a word document and add it to your folder
   3. Working with a partner:
      1. Try to edit your partner's document
      2. What happens?
      3. Give your partner access rights to edit your document
      4. Try to edit the document again and save your changes back to eRoom
      5. What happens?

INFORMATION TECHNOLOGY DIVISION

Exercise #1

1. Access rights (continued)
   1. Change the access rights for your folder to have all new documents initially owned by everyone who can open the folder
   2. Create a powerpoint presentation file and add it to your folder
   3. Working with a partner:
      1. Try to edit your partner's presentation and save the changes back to eRoom
      2. What happens?
      3. Look at the details for both your files to see the owner
      4. Are the owners different?

INFORMATION TECHNOLOGY DIVISION

Exercise #1

2. **Version control**
   1. **Edit your word document and power point presentation, save changes back to eRoom**
   2. **Edit your partner's word document and save changes back to eRoom**
   3. **Look at the versions for your documents**
      1. **Notice the time, date and modifier of each version**
      2. **Select an older version to edit, replacing the newest one**
         1. **Make changes and save back to eRoom**
         2. **Look at the version number**
         3. **What is different about this version?**

Exercise #1

3. **Email inbox**
   1. **In your folder, create a new email inbox called BLI-(name) e.g. BLI-John@eroom2.lbl.gov**
   2. **Create a new word document**
   3. **Login to your LBNL email account via http://www.lbl.gov/mail**
   4. **Create a new email message addressed to your inbox with the document you just created attached.**
   5. **Wait a few minutes**
   6. **Open your eRoom inbox and open the message**
   7. **Copy the attachment from the email message to your folder**
   8. **Edit the document**

Break

- **Any questions?**

Data bases

- **Canned data base overview**

Exercise #2

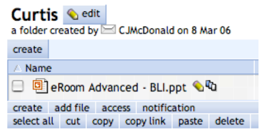
- **Freeform data base overview**

Exercise #3

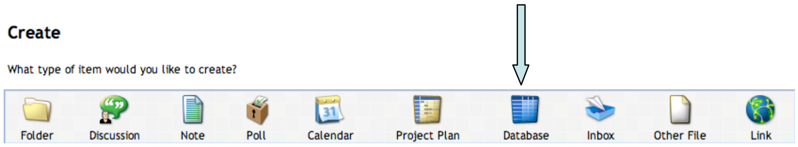
- **Data base import/export overview**
- **Enterprise database overview**

Canned database

- **Choose create**

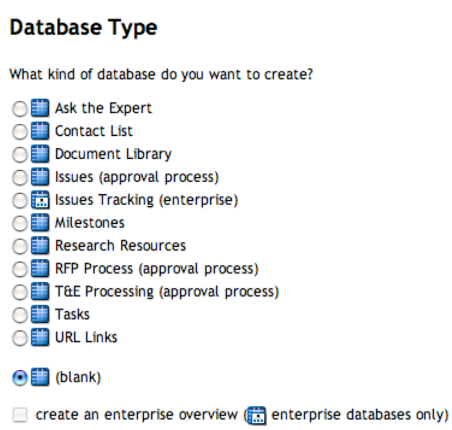


- **Select database**



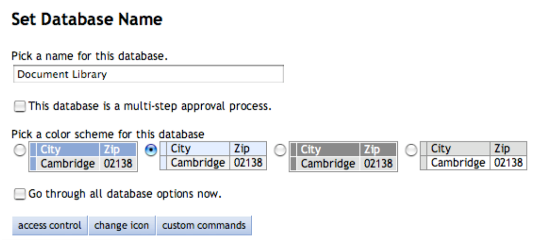
Canned database (2)

- **The following options are shown**



Document Library Database

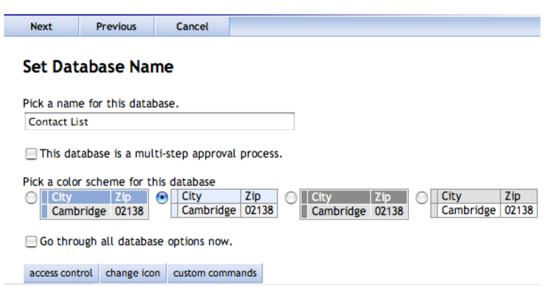
- Select a name
- Choose a color scheme
- Click next



- Document library database is created

Contact List Database

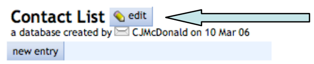
- Select a name
- Choose a color scheme
- Click next



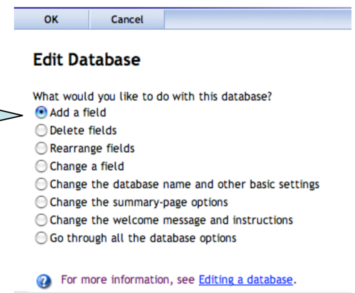
- Data base is created

Contact List Database (Modify)

- **Open the database**
- **Select edit button**



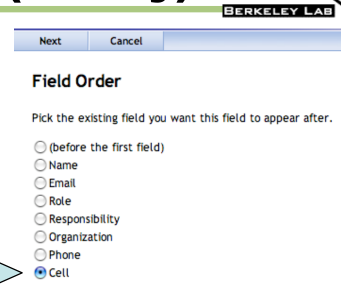
- **The following options are available**
- **Select add a field**



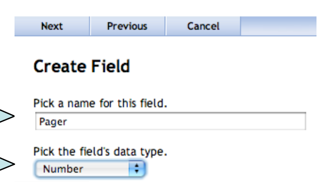
INFORMATION TECHNOLOGY DIVISION

Contact List Database (Modify)

- **Choose the field order**
- **This new field should appear after the cell field**
- **Click next**



- **Enter field name: pager**
- **Select the field data type**
- **Click next**

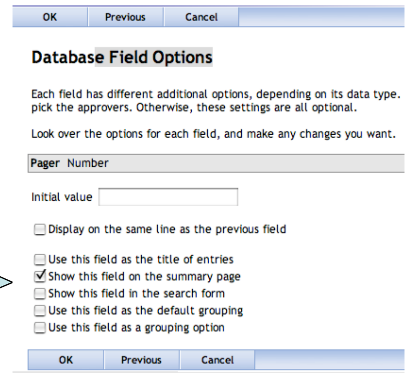


INFORMATION TECHNOLOGY DIVISION

Contact List Database (Modify)

- **Select additional field options, if applicable**

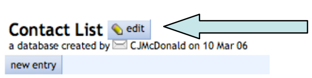
- **Two major items**
  - **Show on summary page**
  - **Show in search form**



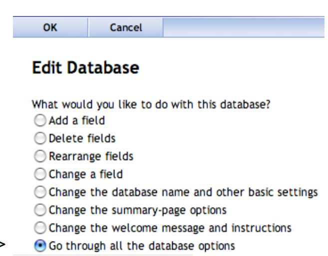
INFORMATION TECHNOLOGY DIVISION

Contact List Database (Modify)

- **Open the database**
- **Select edit button**

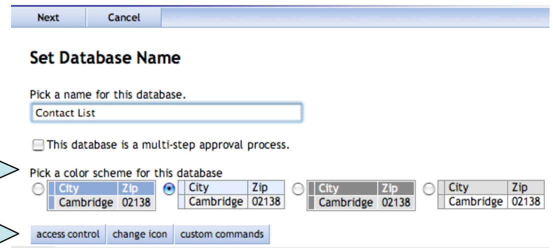


- **The following options are available**
- **Select go through all database options**



INFORMATION TECHNOLOGY DIVISION

Contact List Database (Modify)

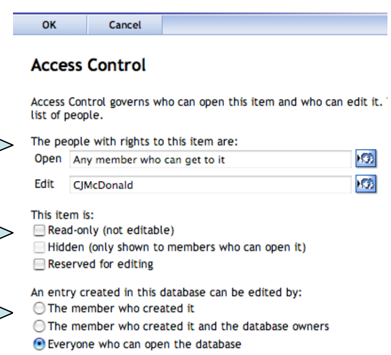


- The name and color scheme can be changed here
- Select access control button

INFORMATION TECHNOLOGY DIVISION

35

Contact List Database (Modify)



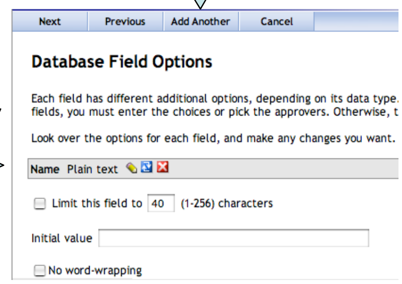
- Select who can open and edit the database
- Select if it should be Read-only or hidden
- Select the initial owner of records in the database
- Select OK and next

INFORMATION TECHNOLOGY DIVISION

36

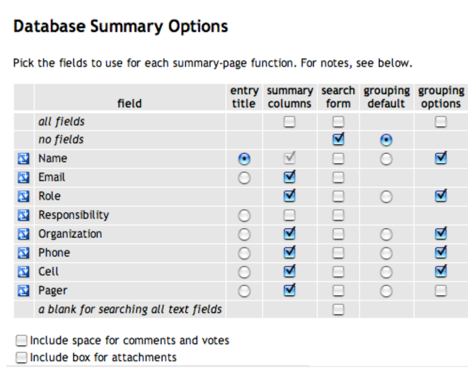
Contact List Database (Modify)

- **Option to add a field shown at top of page**
- **Click pencil to change name**
- **Blue arrows to change order**
- **Red X to delete**
- **The field can limit the number of characters**
- **An initial value can be added**



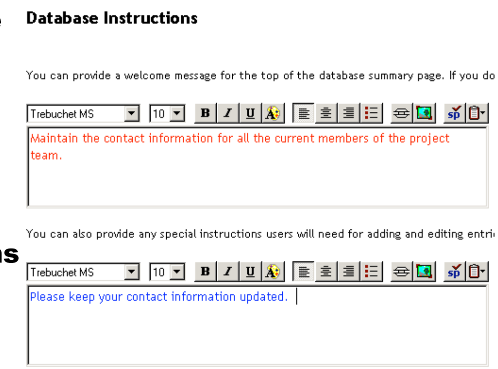
Contact List Database (Modify)

- **Entry title**
  - **The name used by eRoom for the entry**
- **Summary columns**
  - **Shown in summary view**
- **Search form**
  - **Ability to use search tool on this field**
- **Grouping default**
- **Grouping options**
- **Option to have attachments, comments and votes**



Contact List Database (Modify)

- **The welcome message will appear in the summary screen**
- **The special instructions will appear when creating a new entry**



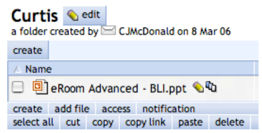
Exercise #2 Database

In the 'BLI Advanced Class' eRoom

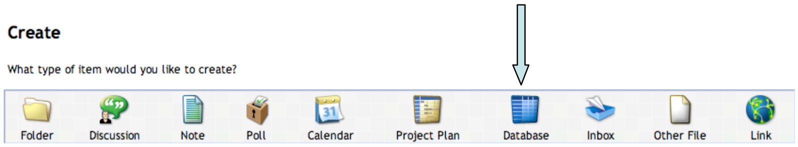
1. **Create a folder named with your first name**
2. **Inside the folder create a 'Document Library' database**
    1. **Name it 'Document Library'**
3. **Edit the database you just created**
    1. **Delete the status field**
    2. **Add an owner field**
        1. **Name it owner**
        2. **After the title field**
        3. **Data type of member list**
    3. **Allow for searching of title field**
4. **Add a new record**
5. **Create a document and add it to the new record**

Freeform Database

- **Choose create**

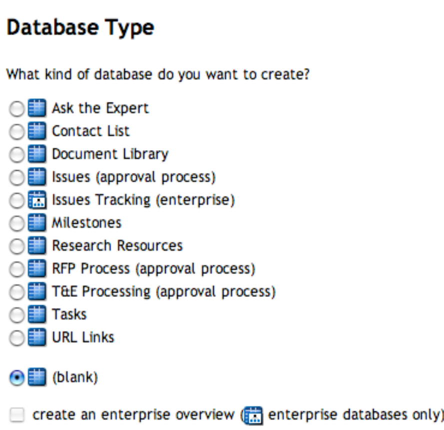


- **Select database**



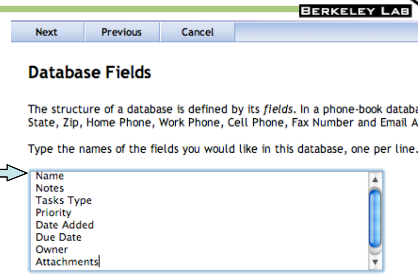
Freeform Database

- **Select blank (default option)**

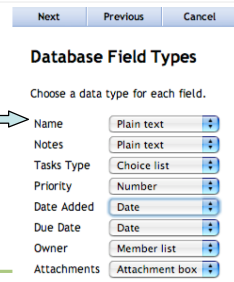


Freeform Database

- **Name the database**
- **Enter names of fields needed in database**



- **Assign a data type to each field**

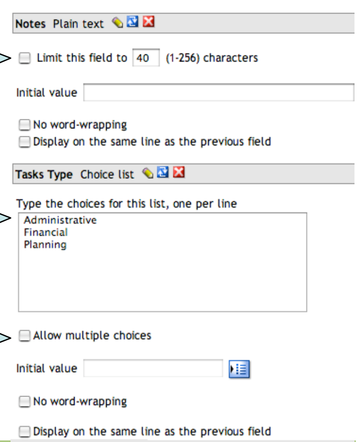


INFORMATION TECHNOLOGY DIVISION

43

Freeform Database

- **Database field options allows for further refinements**
- **Limiting the size of fields**
- **Specifying items in a choice list**
- **Allowing multiple choices**

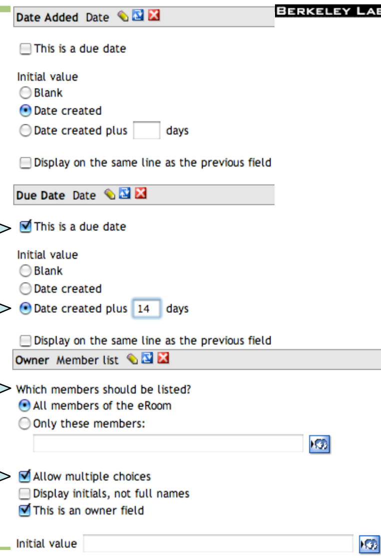


INFORMATION TECHNOLOGY DIVISION

44

Freeform Database

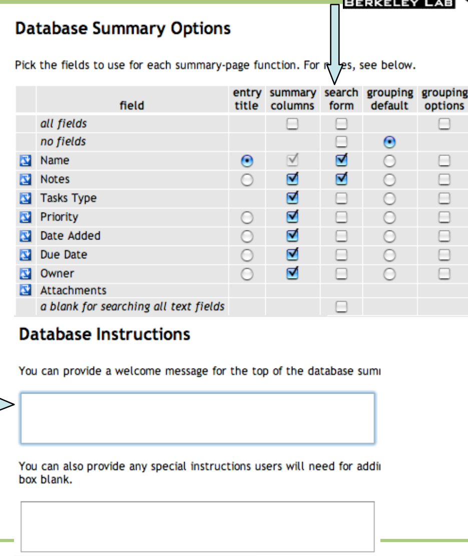
- **For date fields, select if a due date**
- **Can set the initial value**
- **For member list fields can limit list**
- **Can allow multiple choices**



INFORMATION TECHNOLOGY DIVISION

Freeform Database

- **Select search options**



field	entry title	summary columns	search form	grouping default	grouping options
all fields		☐	☐		☐
no fields			☐	◉	
Name	◉	✓	☑	○	☐
Notes	○	☑	☑	○	☐
Tasks Type		☑	☐	○	☐
Priority	○	☑	☐	○	☐
Date Added	○	☑	☐	○	☐
Due Date	○	☑	☐	○	☐
Owner	○	☑	☐	○	☐
Attachments					
a blank for searching all text fields			☐		

- **Add any appropriate database instructions**

INFORMATION TECHNOLOGY DIVISION

Exercise #3 Freeform Database

In the 'BLI Advanced Class' eRoom

- **Inside your folder create a blank database (named tasks) using the following information:**

Fields	Data Type	Additional info.
Name	Plain text	n/a
Priority	Choice list	high, medium & low
Due date	Date	this is a due date
Date added	Date	date created
Owner	Member list	allow multiple choices
Attachments	Attachment box	n/a

INFORMATION TECHNOLOGY DIVISION

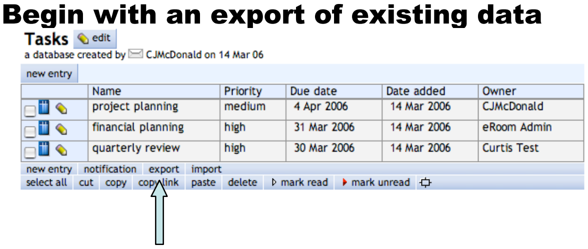
Exercise #3 Freeform Database

- **Add a minimum of three new records to your tasks database**
  - **Select a combination of high, medium and low priorities**
  - **Select different owners and multiple owners**
    - **Make yourself the owner of at least one entry**
  - **Select different due dates for each item**

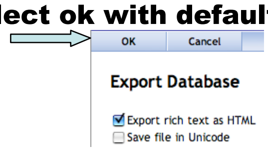
INFORMATION TECHNOLOGY DIVISION

Database: import/export

- **When adding a large amount of data to a database, it will likely be easier to import it from excel**
- **Begin with an export of existing data**



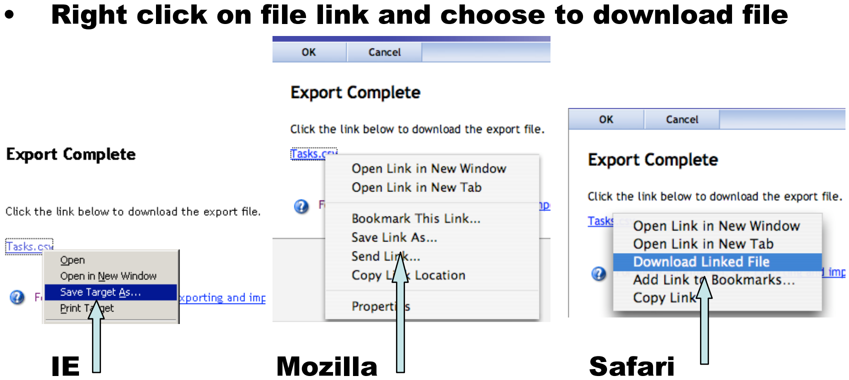
- **Select ok with default settings**



INFORMATION TECHNOLOGY DIVISION

Database: import/export

- **Right click on file link and choose to download file**



IE **Mozilla** **Safari**

INFORMATION TECHNOLOGY DIVISION

Database: import/export

BERKELEY LAB

- **Open exported file with excel**

	A	B	C	D	E	F
1	Name	Priority	Due date	Due date_IsDue	Date added	Owner
2	project planning	medium	4/4/06		3/14/06	CJMcDonald
3	financial planning	high	3/31/06		3/14/06	eRoom Admin
4	quarterly review	high	3/30/06		3/14/06	Curtis Test

- **Create additional entries using existing data format as a guide**
  - **e.g. use 4/4/06 as a date**
    - **Not 04/04/06**
    - **Not March 4, 2006**
  - **e.g. use CJMcDonald as owner**
    - **Not Curtis**
    - **Not McDonald**
    - **Outside people will be listed as name**
      - **E.g. 'John Doe'**

Database: import/export

BERKELEY LAB

- **Add new data to file using copy and paste if possible**

	A	B	C	D	E	F
1	Name	Priority	Due date	Due date_IsDue	Date added	Owner
2	project planning	medium	4/4/06		3/14/06	CJMcDonald
3	financial planning	high	3/31/06		3/14/06	eRoom Admin
4	quarterly review	high	3/30/06		3/14/06	Curtis Test
5						
6	create class	medium	3/19/06		3/18/06	CJMcDonald
7	copy materials	medium	3/20/06		3/18/06	CJMcDonald
8	setup classroom	medium	3/21/06		3/18/06	Curtis Test

- **When finished, remove existing records.**
- **Leave field names in file, row 1**

	A	B	C	D	E	F
1	Name	Priority	Due date	Due date_IsDue	Date added	Owner
2	create class	medium	3/19/06		3/18/06	CJMcDonald
3	copy materials	medium	3/20/06		3/18/06	CJMcDonald
4	setup classroom	medium	3/21/06		3/18/06	Curtis Test

- **Save file, leaving in csv format**

Database: import/export

- **Return to database and select import**

Tasks edit
a database created by CJMcDonald on 14 Mar 06

new entry

	Name	Priority	Due date	Date added	Owner
	project planning	medium	4 Apr 2006	14 Mar 2006	CJMcDonald
	financial planning	high	31 Mar 2006	14 Mar 2006	eRoom Admin
	quarterly review	high	30 Mar 2006	14 Mar 2006	Curtis Test

new entry notification export import
select all cut copy copy link paste delete mark read mark unread

- **Choose the file to import and select ok**

OK Cancel

Import Database

Pick a comma delimited (.csv) file to import into this datatabase.

Choose File Tasks.csv

Incoming formatted text is HTML

INFORMATION TECHNOLOGY DIVISION

Database: import/export

- **Review prompt for data being uploaded.**
- **Select ok**

OK Cancel

Import Tasks.csv

3 rows of data will be imported into 6 fields (Name, Priority, Due date, Due date_IsDue, Date added, Owner). If that doesn't sound right, click Cancel and check your import file.

The easiest way to figure out the proper data format for your import file is to export some of your existing data, and look at the format of the export file.

- **Data will import and be displayed**

new entry

	Name	Priority	Due date	Date added	Owner
	project planning	medium	4 Apr 2006	14 Mar 2006	CJMcDonald
	financial planning	high	31 Mar 2006	14 Mar 2006	eRoom Admin
	quarterly review	high	30 Mar 2006	14 Mar 2006	Curtis Test
	create class	medium	19 Mar 2006	18 Mar 2006	CJMcDonald
	copy materials	medium	20 Mar 2006	18 Mar 2006	CJMcDonald
	setup classroom	medium	21 Mar 2006	18 Mar 2006	Curtis Test

new entry notification export import
select all cut copy copy link paste delete mark read mark unread

INFORMATION TECHNOLOGY DIVISION

Enterprise Database

- Enterprise data bases can pull information from many data bases into an enterprise overview
- Useful for rolling up reports to mangers
- CIS (now ITUS) has used this function to create a standard for all projects
- CIS management can review the status of all projects by viewing the one enterprise view instead of viewing each project eRoom separately

INFORMATION TECHNOLOGY DIVISION

55

Break

- Any questions?

INFORMATION TECHNOLOGY DIVISION

56

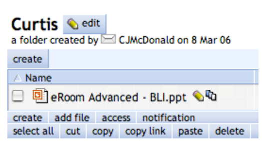
Project Plan

- **Plan**
  - **Create new**
  - **Categories**
  - **Predecessors**
  - **Export/import**
  - **Exercise #4**

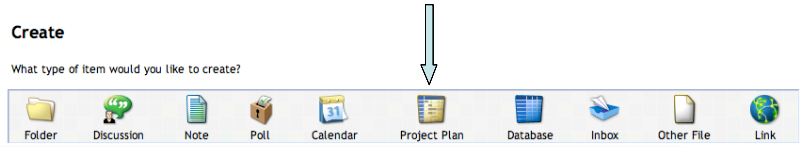
- **Working with plan**
  - **Modifying schedules**
  - **Status reports**

Project Plan Creation

- **Choose create**



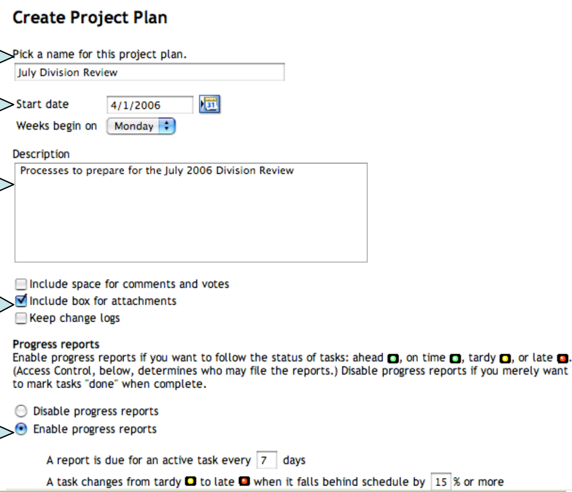
- **Select project plan**



Project Plan Creation

BERKELEY LAB

- **Pick a project name**
- **Start date**
- **Additional description**
- **Attachments, votes, etc. in overview**
- **Progress reporting capability**



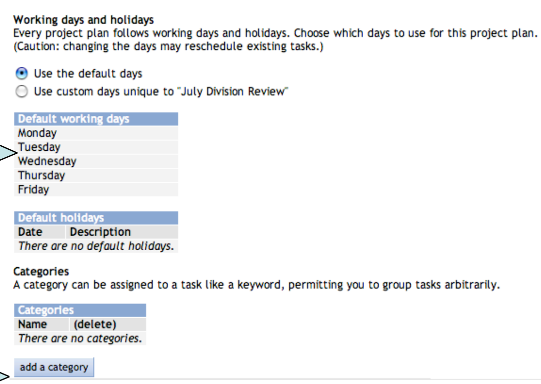
INFORMATION TECHNOLOGY DIVISION

59

Project Plan Creation

BERKELEY LAB

- **Working days**
  - **Can choose to include or remove days from work week.**
- **Categories allow you to sort tasks.**
  - **Use when there are many tasks**
  - **Click add a category**

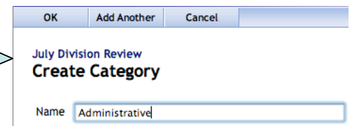


INFORMATION TECHNOLOGY DIVISION

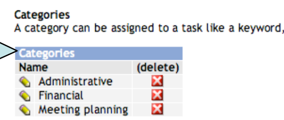
60

Project Plan Creation

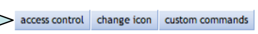
- **Enter the category name and choose to add another**
  - **Continue adding category names until complete**
  - **Click the OK button to enter last category**



- **The categories will all be listed on the project plan creation page**



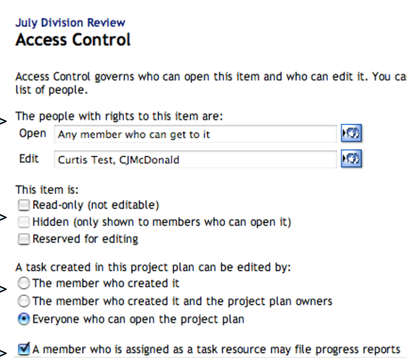
- **Click access control button**



INFORMATION TECHNOLOGY DIVISION

Project Plan Creation

- **Select persons for viewing and edit right to the project plan framework**
- **Choose to make hidden if needed**
- **Select who can edit tasks in this project plan**
- **Select if a person can file progress reports for their tasks**
- **Select ok to complete access rights**

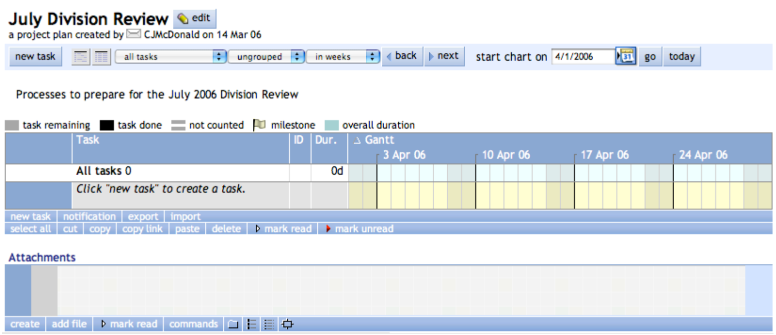


INFORMATION TECHNOLOGY DIVISION

Project Plan Creation

BERKELEY LAB

- **Click ok on previous window to complete the project plan creation**
- **You will now see an empty project plan**

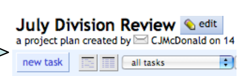


INFORMATION TECHNOLOGY DIVISION

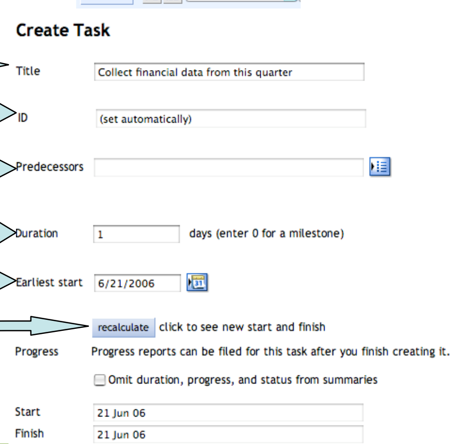
Project Plan Creation

BERKELEY LAB

- **Click the new task button**



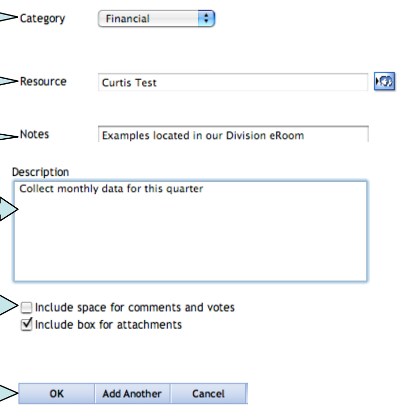
- **Title the task**
- **ID is sequentially created**
- **Predecessors if any apply**
- **Duration in days, not hours**
- **List earliest start date, if applicable**
- **Click recalculate to populate the start and finish fields**



INFORMATION TECHNOLOGY DIVISION

Project Plan Creation

- **Select a category**
- **Select resources**
- **Add notes**
- **Provide a further description**
- **Choose to allow comments, votes and attachments**
- **Select add another or ok when finished adding tasks**



Exercise #4 Project Plan

Inside your folder create a new project plan using the following information:

1. **Name: PRD Process**
2. **Use all defaults unless noted below**
3. **Start date: tomorrow**
4. **Include attachments**
5. **Keep a change log**
6. **Create categories**
   1. **Preparation**
   2. **Training**
   3. **Supervisor Form Completion**
   4. **Review**

Exercise #4 Project Plan

Add the following tasks:

Title	**Create PRD form**
Predecessors	**n/a**
Duration	**3**
Earliest start	**April 1, 2006**
Category	**Preparation**
Resource	**you**

Title	**Insert PRD forms into eRoom**
Predecessors	**‘Create PRD form’**
Duration	**10**
Earliest start	**n/a**
Category	**Preparation**
Resource	**you**

INFORMATION TECHNOLOGY DIVISION

Exercise #4 Project Plan

Add the following tasks:

Title	**Create training plan**
Predecessors	**n/a**
Duration	**8**
Earliest start	**May 1, 2006**
Category	**Training**
Resource	**you & Curtis Test**

Title	**Train staff**
Predecessors	**‘Create training plan’**
Duration	**5**
Earliest start	**n/a**
Category	**Training**
Resource	**Curtis Test**

INFORMATION TECHNOLOGY DIVISION

Exercise #4 Project Plan

Add the following tasks:

Title	**Create PRDs for employees**
Predecessors	**'Insert PRD forms into eRoom' & 'Train staff'**
Duration	**20**
Earliest start	**n/a**
Category	**Supervisor Form Completion**
Resource	**Everyone**

INFORMATION TECHNOLOGY DIVISION

Exercise #4 Project Plan

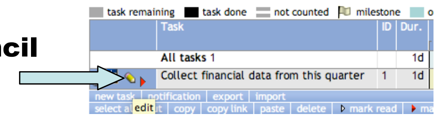
Add the following tasks:

Title	**Supervisor review of PRDs**
Predecessors	**'Create PRDs for employees'**
Duration	**10**
Earliest start	**n/a**
Category	**Review**
Resource	**pick two people**

INFORMATION TECHNOLOGY DIVISION

Project Plan Management

- After a plan has been created you may need to modify it
- To add a new task, simply follow procedure on previous slides
- To edit a task click the pencil next to the name
  - Modify any items
    - ~ Start date
    - ~ Duration
    - ~ Owner



Project Plan Task Management

- As a task owner you will need to provide progress reports
- Daily email notifications are provided for the owner of tasks when they are
  - Upcoming (< week)
  - In progress
  - Tasks behind schedule
  - Progress report behind schedule

Project Plan Task Management

BERKELEY LAB

- **To provide progress reports**
  - **Click link in email to go directly to report**
  - **Click tasks entry in project plan**

task remaining | task done | not counted | milestone | o

	Task	ID	Dur.
	All tasks 1		1d
	Collect financial data from this quarter	1	1d

new task | notification | export | import
select all | cut | copy | copy link | paste | delete | mark read | ma

  - **Click link for progress field**

summary

Title	Collect financial data from this quarter
ID	1
Predecessors	
Duration	1 day(s)
Earliest start	21 Jun 06
Progress	0% done (0 day done, 1 day remaining)
Latest report	None
Status	not started
Omit from summaries	no
Start	21 Jun 06
Finish	21 Jun 06
Category	Financial
Resource	Curtis Test
Notes	Examples located in our Division eRoom
Description	Collect monthly data for this quarter

Project Plan Task Management

BERKELEY LAB

- **Enter status data**
  - **% done OR days done OR days left**
  - **Comment to reflect task status**

Collect financial data from this quarter

Report Progress

Enter progress as of today. You can enter progress as a percentage of the task's duration, or as days done, or as days remaining.

New report

Date	Status	% Done actual	% Done plan	Days done actual	Days done plan	Days left actual	Days left plan	Comment	Current duration	Current start	Curren finish
today	100% (0.1d) ahead	10 %	0%	0.1 d	0d	0.9 d	1d	started task	1	21 Jun 06	21 Jun

Progress reporting history

There are no progress reports for this task.

  - **Progress report history cannot be modified or removed**
  - **Anyone with viewing rights to the project plan can view the progress reports**

Resources for information

- http://www.lbl.gov/ITSD/CIS/citg/eroom/
  - eRoom overview
- https://eroom2.lbl.gov/eRoomHelp/en/eRoom-7.htm#index.htm
  - eRoom help page
  - Select in top right corner of any eRoom page
- Custom eRoom training & consulting from lab eRoom expert.

INFORMATION TECHNOLOGY DIVISION

INFORMATION TECHNOLOGY DIVISION

Questions?